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TO : Chief, Management Staff

DATE: 4 August 1958

FROM : O&M Examiner

SUBJECT: Report of Project S-10, Records of Overseas Service

REF : Memorandum for Acting Deputy Director (Support) from Chief, Management Staff dated 24 April 1958, Subject Questionnaire on Overseas Duty.

This project was presented as a problem: "To develop a method or methods for establishment and maintenance of verified records of actual time spent overseas on PCS or TDY by all Agency staff agents and staff employees." The immediate need was to develop statistics to permit planning of a more advantageous retirement program; the long range need was to provide verified information for retirement eligibility purposes for future use. Analysis indicated that the problem could logically be broken into three related phases, each susceptible to separate treatment and this was done as follows:

PHASE I: What method is most suitable to be employed for obtaining the necessary planning data to use in working out potential retirement formulae?

This phase of the project involved a staff study (see Reference) which provided approvals and authorities to conduct a survey of past overseas service of all current staff employees and staff agents for Agency retirement planning and statistical analysis purposes. The balance of this phase was concerned with methods, procedures and documents which were developed to carry out the survey as approved in the staff study. [REDACTED] survey card form 1451 with 25X1A accompanying information card and [REDACTED] were used to 25X1A obtain the necessary overseas service information (See Tab A). Additionally, appropriate individuals in all Agency components were briefed as to the methods and procedures to be used to obtain the information from all staff agents with due consideration for the cover and security aspects of such an all inclusive survey. The cut-off date for survey information was 1 July 1958 at which time phase II became operative.

PHASE II: What kind of system can be developed to permit maintenance of verified records of overseas service in the future?

1. The Phase I survey provided unverified information through 30 June 1958. Phase II was concerned primarily with developing a system and setting up procedures for obtaining verified records of overseas service of Agency staff employees and staff agents beginning

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1 July 1958 and continuing indefinitely. The staff study prepared in connection with Phase I pointed up the inadequacy of current personnel actions for purposes of documenting physical whereabouts of Agency personnel. It was known, of course, that the Office of the Comptroller processes and retains documents reflecting both PCS and TDY Travel and therefore was the most logical place to obtain overseas service information on a current basis.

2. The Comptroller agreed with the above, but pointed out that he believes personnel records should reflect whereabouts and status of Agency personnel without relying on the Comptroller's records for the information; therefore, the procedures worked out for obtaining current PCS overseas service information from the Comptroller's records were accepted by the Comptroller and agreed to by the Director of Personnel as an interim measure. Since TDY duty information is not usually related to personnel status, the Comptroller agreed that this information will be obtained by his office from travel vouchers on a continuing basis. By beginning to pick up overseas service information on a current basis from the Comptroller's Records on 1 July 1958, a gap in information has been avoided, needed records for future planning and statistical purposes will be available on a continuing basis, and a verified record of CIA overseas service is being compiled for retirement use if and when the Agency acquires a retirement program involving credit for overseas service.

3. Comptroller Instruction no. 58 dated 25 June 1958 and form 1451a (Tab B) set forth the procedures to be used by the Fiscal and Finance Divisions to extract overseas service information from pertinent documents as they process through these offices. These procedures will provide verified records of all Agency overseas service of staff employees and staff agents, except for individuals in the Development Project Staff, DCI. DPS/DCI overseas service information will be recorded by selected personnel of that staff using Comptroller Instruction no. 58 and form 1451a with minor changes. The completed forms will be forwarded directly to the Personnel Statistical Branch for processing.

4. Phase II also includes the use of the Phase I survey cards to obtain prior U.S. Government overseas service information from all staff employees and staff agents as they enter on duty. As this information accrues, it will be added to the survey information already on file. The procedure for obtaining prior U.S. Government overseas service information from new employees was included as a part of regular EOD procedures on 13 June, the date the Phase I survey cards were distributed to all Headquarters personnel. In this connection, it should be noted that all survey cards (Phases I and II) are coded as "Survey" and all verified overseas service records are coded as "Verified". This will permit greater flexibility in the use of the information and facilitate keeping survey information separate from verified information as desired.

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PHASE III: What are the most suitable methods and timing to be used to reconstruct verified records of overseas duty?

1. If an when the Agency acquires a retirement program involving some credit for overseas service, it will be necessary to verify all claimed but not verified overseas service and to establish the degree of acceptability of existing verified records for all Agency employees who are then eligible for overseas retirement benefits. Since there is not now such a program and the details and requirements will not be known until after legislation covering such retirement is presented to the Congress and acted upon, there is no point in doing more than suggesting broad guidelines to be used in the development of detailed procedures when such becomes practical:

- a) Establishment of extent of overseas service credit contained in any new retirement program will require a review of the pertinency of overseas service which has been recorded. In order to avoid the necessity for a future survey to correct information deficiencies, all overseas service considered possibly pertinent is being recorded currently with the thought that some, at least, will not be creditable but that it is better to err in the direction of too broad a coverage rather than too little at this time.
- b) Current overseas service information being picked up from official documents and recorded as verified, should reduce substantially the amount of research required to effect payment under some future retirement program; however, it is probable that most cases will require some research. In order to simplify this problem, the initial survey cards (Phase I and EOD procedures from Phase II) will be retained for potential future use as a starting point for whatever verification procedures may be adopted.
- c) At such time as a new retirement program becomes effective, the Agency will be faced with a potentially tremendous research problem. It is suggested that as soon as the retirement formula become firm, a systematic annual retirement projection be made. This could be a machine report prepared annually in advance of the end of the calendar year for the last two months of the current year and the entire next year (thus avoiding conflict with other year end reports), giving the name and retirement eligibility date for each person who will reach a retirement situation during the next 14 months. This would provide a two month overlap each year. Retirement research would be required only for those people reaching a retirement situation during the full year covered by the report. The two month overlap would be useful for verification purposes. The research necessary for any individual case could then be done in an orderly fashion and only for those persons who would actually retire under the new program.

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